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World Production and Trade

United States
Department of
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Foreign
Agricultural
Service

Washington, D.C. 20250

Weekly
Roundup

WR 18-87

May 6, 1987

The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade.

GRAIN AND FEED

ROMANIAN Grain Trade Shifts. Reports from Romania indicate that corn exports are expected to fall as a result of stock building this marketing year. Romania exported an average of about 1 million tons of corn per year over the past six years, with most going to the USSR. While it is expected that Romania will continue to ship corn to the Soviet Union, lower exportable supplies could mean increased export opportunities for the United States.

SOVIET Planting Slowed by Late Spring. Soviet spring plantings were carried out on 15.8 million hectares as of April 27, according to the April 30th edition of Izvestiya. Small grains and pulses accounted for 6.7 million hectares of that figure. Spring is late in European USSR, shown by comparing this year's progress with that of previous years.

Date	Total Spring Crop Seeded (Million Hectares)	Small Grains and Pulses
April 27, 1987	15.8	6.7
April 28, 1986	41.5	N/A
April 29, 1985	32.6	N/A
April 30, 1984	47.9	N/A
April 25, 1983	48.4	26.1
April 26, 1982	24.4	12.6

DAIRY, LIVESTOCK AND POULTRY

THAILAND'S Broiler Industry Grows Rapidly. Broiler production in Thailand is forecast to total 468,000 tons in 1987, according to the U.S. agricultural attache in Bangkok. That would be 9 percent above 1986 which in turn was 10 percent above 1985. Rapid growth in demand in both the domestic and export markets has resulted in strong broiler prices, which along with lower feed prices, have given producers the incentive to expand operations.

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SALLY KLUSARITZ, Editor, Tel. (202) 447-3448. Additional copies may be obtained from FAS Media and Public Affairs Branch, 5922-S, Washington, D.C. 20250. Tel. (202) 447-7937.

FRUITS

Production of Dried Prunes in SOUTHERN HEMISPHERE To Decline.

Production of dried prunes in the Southern Hemisphere during the 1986/87 season is forecast at 17,350 tons, down 11 percent from the 1985/86 volume. Smaller harvests of fresh plums and prunes in Argentina, Australia and South Africa are expected to reduce dried packs in all three countries significantly. The greatest shortfall is projected in Argentina where, for the second consecutive year, late-season frosts severely damaged the main plum crop in Mendoza. Current assessments point to a 33-percent decline in Argentina's dried prune pack. Chile is the only Southern Hemisphere producer expected to have ample supplies of dried prunes this season. Its 1986/87 pack is forecast to increase 8 percent to a record 10,000 tons--a reflection of continued growth in area and yields.

The following table shows prune production in metric tons (packed-weight basis) for selected countries in the Southern Hemisphere.

	1984/85	1985/86	1986/87 1/
Argentina	8,000	4,500	3,000
Australia	3,547	3,300	2,600
Chile	5,500	9,300	10,000
South Africa	1,652	2,395	1,750
Total	18,699	19,495	17,350

1/ Preliminary.

Production of Raisins/Sultanas Off Sharply in the SOUTHERN HEMISPHERE. Preliminary assessments indicate that the 1986/87 raisin/sultana pack in the Southern Hemisphere will total only 104,500 tons, 28 percent below the 1985/86 volume. Production in Argentina is expected to rebound due to excellent growing conditions and a bumper fresh grape crop. This season's projected shortfall in Australia appears substantial. After five years of high production, grape vines yielded a much smaller crop despite favorable growing conditions. An increase in winery intake considerably reduced the volume of fruit available for drying. As a result, Australia's 1986/87 pack of raisins and sultanas is forecast at only 60,000 tons compared with 93,200 tons last season and an annual average production of nearly 83,000 tons over the previous five years.

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Chile is facing similar problems this season. An unusually small wine grape harvest increased competition among wineries and raisin processors for fresh grape supplies. Since winery prices exceeded processor offerings, many farmers who normally dry their grapes decided not to take the risk and sold to wineries. Thus, Chile's raisin pack is expected to fall 11 percent short of last season's record pack. The smaller raisin/sultana pack forecast for South Africa reflects a shortage of fresh product (lower yields because of alternate bearing) and untimely rains during the drying period. Although the current forecast points to a 21-percent drop in production, the 1986/87 pack is potentially the third largest to date.

The following table shows raisin/sultana production in metric tons (packed-weight basis) for selected countries in the Southern Hemisphere.

	1984/85	1985/86	1986/87 1/
Argentina	5,800	4,900	6,000
Australia	70,327	93,200	60,000
Chile	6,200	9,000	8,000
South Africa	28,545	38,948	30,500
Total	110,872	146,048	104,500

1/ Preliminary.

SUGAR

WORLD Sugar Production Forecast Shows Increase. World centrifugal sugar production is forecast at a record 102.4 million tons (raw value) for 1987/88, 1 percent above 1986/87, and 3 percent more than 1985/86. World production of sugar from cane is forecast at 65.4 million tons, up 3 percent; sugar from beets is forecast at 36.9 million tons, a decrease of 3 percent from last year.

Production in the European Community is forecast to decline 7 percent in 1987/88, with area to be harvested to decline 3 percent. A return to more normal yields is forecast. West Germany is expected to have the largest decline, 370,000 tons. Extraordinarily high sugar content of 17.9 percent in the 1986/87 West German crop pushed output in that country to a record level. For 1987/88, area is forecast to decline by 14,000 hectares and sugar content is likely to return to more normal levels. The largest percentage decrease in production is expected to occur in the Netherlands, down 25 percent from last year. In France, the largest producing country in the EC, sugar output is expected to remain virtually unchanged as no adjustments in area from the previous season are foreseen. Production in other West European countries is forecast to increase 2 percent. Eastern Europe's output is expected to fall 4 percent from 1986/87, mainly because of an expected reduction of area in East Germany and Poland.

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Sugar production in the Soviet Union, one of the world's largest producers, is forecast at 8.9 million tons in 1987/88, down 2 percent from last year's revised outturn of 9.1 million tons. Although harvested area is expected to increase slightly from 1986, the 1986 average sugar content of 16.2 percent and the high sugar extraction rate of 11.67 percent reported in official data are unlikely to occur this season. Since the introduction of industrial cropping technology, which includes aspects of production, marketing and processing and now encompasses more than 80 percent of the beet area, the efficiency of the sugar industry in the Soviet Union has increased significantly.

The forecast for Brazil, another large producer, is 9.2 million tons, up 5 percent from the revised 1986/87 crop of 8.8 million tons. Cane harvested for sugar production in 1987/88 is forecast at 119 million tons from an area of 1.95 million hectares, about half of the 3.95 million hectares planted to cane. The cane on the remaining area will be used for fuel alcohol production, animal feed and liquor for human consumption.

Sugar production in Asia is forecast to increase in all six of the region's largest producing countries. India's production is forecast to surpass 9 million tons in 1987/88, 5 percent more than last season. The area under cane is projected to increase to 3.3 million hectares, compared to 3.1 and 2.86 million hectares in 1986/87 and 1985/86, respectively. Sugar outturn in China is forecast to increase 3 percent over the previous season but probably will not reach the record 1985/86 total of 5.5 million tons. The forecast for 1987/88 for Thailand and the Philippines indicates an increase of about 8 percent for both countries. Production for both Indonesia and Pakistan is forecast 6 percent above last year.

South African sugar production is forecast at 2.2 million tons in 1987/88, 5 percent over last year, although harvested area is expected to be down slightly from the 270,000 hectares harvested in 1986/87. Climatic conditions were not favorable for optimal growth and yield, and the cane crop suffered from drought providing a smaller-than-expected crush for 1986/87.

Australian sugar output is forecast down slightly in 1987/88 because yields are not expected to match last year's generally good performance. Little change in area is forecast.

Regional sugar production estimates are as follows in million tons (raw basis):

Region	-----1986/87-----			-----1987/88-----		
	Beet	Cane	Total	Beet	Cane	Total
North America	3.16	6.69	9.85	3.2	7.0	10.2
South America	0.52	13.23	13.75	0.5	13.6	14.1
Central America	0	1.77	1.77	0	1.8	1.8
Caribbean	0	8.51	8.51	0	8.7	8.7
EC 12	14.72	0.02	14.74	13.7	1/	13.7
Other West Europe	0.94	0	0.94	1.0	0	1.0
East Europe	5.71	0	5.71	5.5	0	5.5
USSR	9.10	0	9.10	8.9	0	8.9
North Africa	0.45	1.49	1.94	0.5	1.5	2.0
Other Africa	0	5.92	5.92	0	5.8	5.8
Middle East	2.05	0.30	2.35	2.2	0.3	2.5
Asia 2/	1.53	21.66	23.19	1.5	22.8	24.4
Oceania	0	3.94	3.94	0	3.9	3.9
Total 3/	38.18	63.54	101.72	36.9	65.4	102.4

1/ Less than 50,000 tons. 2/ Includes an estimated 530,000 tons of Khandsari sugar in India for each year. 3/ May not add due to rounding.

CREDIT NOTES

Changes Announced in GSM-102 and 103 for IRAQ. USDA reallocated GSM-102 credit to increase Iraq's sugar line to \$40 million. The GSM-103 line for Iraq was amended to include coverage for frozen beef variety meat.

EXPORT ENHANCEMENT INITIATIVES

The status of USDA's Export Enhancement Program as of April 30, 1987, was as follows in metric tons:

ANNOUNCED INITIATIVES	DATE ANNOUNCED	QUANTITY/RESULTS	
67. Soviet Union wheat	Apr. 30, '87	4,000,000	
66. Turkey rice	Apr. 3, '87	70,000	
65. Colombia barley malt	Apr. 3, '87	15,000	
64. Iraq table eggs	Feb. 20, '87	189 million	eggs
63. Canary Islands poultry	Feb. 9, '87	5,000	
62. Nigeria wheat	Jan. 28, '87	500,000	
61. China wheat	Jan. 26, '87	1,000,000	COMPLETE
60. Iraq wheat	Jan. 16, '87	800,000	Sold 440,000
59. Switzerland barley or sorghum	Jan. 16, '87	250,000	Sold 9,000
58. Poland wheat	Jan. 7, '87	500,000	COMPLETE
57. Poland barley or sorghum	Dec. 31, '86	200,000	Sold 137,000
56. Romania wheat	Dec. 23, '86	250,000	

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EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

55. Iraq poultry	Dec. 22, '86	60,000	Sold 25,000
54. Dominican Republic table eggs	Dec. 9, '86	25 million eggs	Sold 11.1 million eggs
53. Zanzibar wheat flour	Dec. 9, '86	20,000	
52. Tunisia barley	Dec. 1, '86	150,000	
51. Gulf countries (Bahrain Kuwait, Oman, Qatar, United Arab Emirates) dairy cattle	Oct. 30, '86	1,500 head	Sold 740
50. West Africa (Cameroon Cote d'Ivoire, Ghana, Togo) wheat	Oct. 30, '86	345,000	Sold 79,500
49. Dominican Republic poultry	Oct. 29, '86	1,500	Sold 1,133
48. Philippines barley malt	Oct. 20, '86	60,000	Sold 25,000
47. Cameroon wheat flour	Oct. 14, '86	20,000	
46. Romania barley	Sept. 24, '86	200,000	Sold 125,000
45. Venezuela barley malt	Sept. 4, '86	100,000	
44. Cyprus barley	Aug. 26, '86	150,000	Sold 108,000
43. Canary Islands wheat	Aug. 8, '86	100,000	
42. Egypt semolina	Aug. 6, '86	30,000	Sold 23,000
41. Soviet Union wheat	Aug. 1, '86	4,000,000	EXPIRED
40. Canary Is. dairy cattle	July 28, '86	3,000 head	COMPLETE
39. Hong Kong table eggs	July 28, '86	44 million eggs	COMPLETE
38. Senegal wheat	July 17, '86	100,000	COMPLETE
37. India vegetable oil	July 8, '86	25,000	COMPLETE
36. Jordan barley	June 17, '86	60,000	
35. Israel barley	June 17, '86	200,000	Sold 66,682
34. Tunisia dairy cattle	May 29, '86	4,000 head	COMPLETE
33. Algeria dairy cattle	May 29, '86	5,000 head	COMPLETE
32. Sri Lanka wheat	May 16, '86	125,000	COMPLETE
	March 5, '87	95,000	Sold 85,000
31. Saudi Arabia barley	May 7, '86	500,000	COMPLETE
	Aug. 6, '86	250,000	COMPLETE
	Sept. 16, '86	300,000	COMPLETE
	Oct. 8, '86	200,000	COMPLETE (201,000)
	Jan. 5, '87	1,250,000	COMPLETE
30. Algeria barley	Apr. 17, '86	500,000	
29. Morocco dairy cattle	Apr. 16, '86	4,000 head	COMPLETE
28. Turkey dairy cattle	Apr. 16, '86	5,000 head	COMPLETE
27. Egypt dairy cattle	Apr. 16, '86	6,000 head	COMPLETE
	Sept. 12, '86	10,000 head	Sold 2,801
26. Yemen poultry feed	Apr. 14, '86	150,000	Sold 7,000
25. Yugoslavia wheat	Apr. 10, '86	200,000	COMPLETE
	June 24, '86	200,000	COMPLETE
	Oct. 7, '86	500,000	Sold 118,050
24. Indonesia dairy cattle	Apr. 9, '86	7,500 head	COMPLETE

EXPORT ENHANCEMENT PROGRAM INITIATIVES (CONT)

23. Syria wheat	Apr. 8, '86	700,000	CANCELLED
22. Benin wheat	Apr. 7, '86	45,000	Sold 30,000
21. Algeria table eggs	Apr. 4, '86	500 million	eggs
20. Iraq dairy cattle	Apr. 4, '86	6,500 head	Sold 770
19. Jordan wheat	Mar. 19, '86	75,000	COMPLETE
	June 20, '86	75,000	COMPLETE
	Dec. 31, '86	225,000	COMPLETE
18. Tunisia wheat	Mar. 18, '86	300,000	COMPLETE
	Aug. 22, '86	800,000	Sold 250,000
17. Algeria wheat flour	Feb. 25, '86	100,000	
16. Algeria semolina	Feb. 11, '86	250,000	Sold 30,000
15. Philippines wheat	Jan. 7, '86	150,000	COMPLETE (152,400)
14. Zaire wheat	Dec. 27, '85	35,000	COMPLETE
	May 15, '86	45,000	COMPLETE
	Oct. 17, '86	40,000	Sold 33,000
13. Nigeria barley malt	Dec. 10, '85	100,000	Sold 23,700
12. Iraq wheat flour	Dec. 9, '85	150,000	COMPLETE
	Jan. 7, '87	175,000	Sold 25,000
11. Egypt poultry	Nov. 26, '85	8,000	COMPLETE
	Mar. 21, '86	15,000	COMPLETE
	June 18, '86	5,000	COMPLETE
	July 8, '86	15,000	COMPLETE
	Dec. 19, '86	25,000	Sold 12,500
	Feb. 27, '87	6,000	
10. Zaire wheat flour	Nov. 18, '85	64,000	COMPLETE
	May 15, '86	30,000	Sold 15,000
9. Philippines wheat flour	Nov. 15, '85	100,000	Sold 50,000
8. Jordan rice	Nov. 8, '85	40,000	Sold 38,700
	Jan. 13, '87	60,000	
7. Turkey wheat	Oct. 16, '85	500,000	COMPLETE (506,600)
	May 8, '86	500,000	Sold 248,000
6. Morocco wheat	Sept. 30, '85	1,500,000	COMPLETE
	Dec. 9, '86	790,000	Sold 260,000
5. Yemen wheat	Sept. 6, '85	100,000	COMPLETE
	Jan. 26, '87	100,000	Sold 25,000
4. Yemen wheat flour	Aug. 20, '85	50,000	COMPLETE
	Apr. 14, '86	100,000	COMPLETE
3. Egypt wheat	July 26, '85	500,000	COMPLETE
	Oct. 30, '85	500,000	COMPLETE (512,500)
	June 24, '86	500,000	COMPLETE
	July 29, '86	52,000	Sold 29,000
	Oct. 8, '86	1,000,000	Sold 406,000
2. Egypt wheat flour	July 2, '85	600,000	COMPLETE
	Aug. 6, '86	600,000	
1. Algeria wheat (ex durum)	June 4, '85	1,000,000	COMPLETE
wheat (ex durum)	Apr. 10, '86	1,000,000	Sold 354,000
durum	Nov. 10, '86	300,000	COMPLETE
durum	Mar. 16, '87	300,000	Sold 236,000

EXPORT ENHANCEMENT PROGRAM SUMMARY

Announced as of April 30, 1987

Announced to Date 27,178,680 tons grains and products (grain equivalent)
758 million table eggs
140,500 tons frozen poultry
52,500 head dairy cattle
25,000 tons vegetable oil

Sold to Date 10,545,059 tons wheat
1,446,876 tons flour (grain equivalent)
2,840,682 tons barley
72,610 tons semolina (grain equivalent)
64,932 tons barley malt (grain equivalent)
106,000 tons sorghum
38,700 tons rice
7,000 tons poultry feed
25,000 tons vegetable oil
81,633 tons frozen poultry
38,636 head dairy cattle
54,572,004 table eggs

Total Sales Value: \$1,459.4 million
Estimated Bonus Book Value: \$966.6 million
Market Value of Awards: \$675.1 million

TARGETED EXPORT PROMOTION PROGRAM

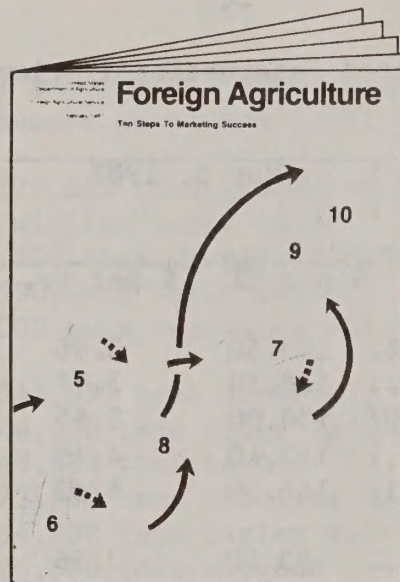
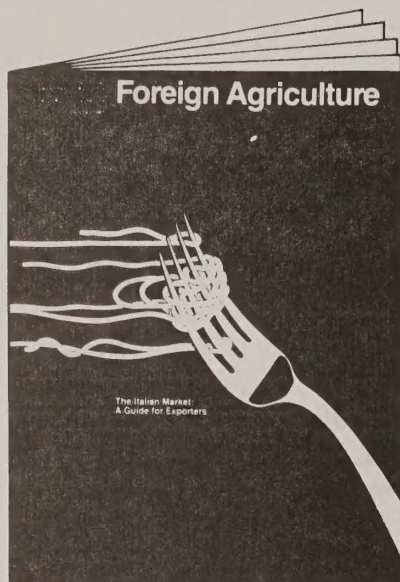
No announcements were made under the Targeted Export Assistance Program this week.

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Selected International Prices

Item	:	May 5, 1987	:	Change from	:	A year
	:		:	a week ago	:	ago
ROTTERDAM PRICES 1/		\$ per MT	\$ per bu.	\$ per MT		\$ per MT
Wheat:						
Canadian No. 1 CWSR-13.5%.		145.50	3.96	-3.00		N.Q.
U.S. No. 2 DNS/NS: 14%....		138.50	3.77	+0.50		164.50
U.S. No. 2 S.R.W.10/		134.00	3.65	+5.00		124.00
No. 3 H.A.D.....		152.40	4.15	-8.60		160.00
Canadian No. 1 A: Durum11/		166.00	4.52	+4.00		N.Q.
Feed grains:						
U.S. No. 3 Yellow Corn....		93.00	2.36	+3.50		114.00
Soybeans and meal:						
U.S. No. 2 Yellow.....		N.Q.	--	--		216.70
Brazil 47/48% Soya Pellets		196.00	--	+4.00		192.00
U.S. 44% Soybean Meal..12/		193.00	--	+2.00		186.00
U.S. FARM PRICES 3/						
Wheat.....		96.99	2.64	+4.04		120.87
Barley.....		70.27	1.53	+4.59		64.76
Corn.....		64.57	1.64	+3.54		89.76
Sorghum.....		57.54	2.61 2/	-0.88		85.98
Broilers.....		1,046.74	--	+20.72		1,120.38
EC IMPORT LEVIES						
Wheat 5/.....		236.65	6.44	+6.25		172.35
Barley.....		230.35	5.02	+6.10		166.80
Corn.....		216.95	5.51	+7.25		152.05
Sorghum.....		224.45	5.70	+4.70		158.25
Broilers 4/ 6/ 8/.....		--	--	--		--
EC INTERVENTION PRICES 7/ 9/						
Common wheat(feed quality)		226.40	6.16	+2.95		195.75
Bread wheat (min. quality)		236.95	6.45	+3.10		207.85
Maize.....		236.95	6.02	+3.10		195.75
Barley and all other feed grains, excluding maize.		226.40	--	+2.95		195.75
Broilers 4/ 6/.....		--	--	--		--
EC EXPORT RESTITUTIONS (subsidies)						
Wheat		N.A.	--	--		98.30
Barley.....		158.55	3.45	+3.45		126.85
Broilers 4/ 6/ 8/.....		--	--	--		--

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Five-day moving average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. 9/ Changes may be due partly to exchange rate fluctuations and/or ECU payments. 10/ July shipment. 11/ April/May shipment. 12/ May shipment. N.A.=None authorized. N.Q.=Not quoted. Note: Basis June delivery.



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